

IT Initiative Supplement Instructions

February 25, 2010

Purpose of the IT Initiative Supplement

This document is the collection vehicle to assemble information required for the state IT planning and budgeting process for IT investments. The Supplement document has been shortened and simplified this year. After completing this document, you can use the information from it to enter into the MBARS IT Projects Budget Module.

The IT Initiative Supplement also fulfills part of the Montana Information Technology Act requirements for agency IT plans. MCA 2-17-523-(3) requires that all new investments in information technology can be included in the governor's budget only if the project is contained in the approved agency information technology plan. New investments are not limited to new budget requests, they also include IT investments funded from existing agency base budgets. DOA can only recommend new IT investments if they are included in the agency IT plan. IT Budget Planning Documents are considered components of an agency's IT plan.

What IT Investments and Projects to Document

The Supplement document provides more information about the IT Initiatives you listed in section 5 of your Agency IT Plan. For EPP budgeting purposes, include all IT investments, projects, or initiatives in an IT Initiative Supplement.

For state budgeting (non-EPP) and agency IT planning purposes, include all IT investments, projects, or initiatives that will have expenditures during FY2010 through FY2015. This covers the current biennium as well as the next two biennium. Complete an IT Initiative Supplement for each IT initiative that meets at least one of the following criteria:

- An IT initiative with a budget of \$500,000 or more, whether or not it is an EPP item, for the next biennium. The \$500,000 budget is the sum of all grants, current operating budget expenses, new budget allocations, special fees, and other sources of funds and includes costs associated with internal builds.
- An IT initiative with a budget of \$100,000 or more and also comprises 25% or more of the agency's IT budget, whether or not it is an EPP item.
- An EPP request that requires \$25,000 or more in IT expenditures.

IT Planning Timetable

1. ITSD published the Agency IT Plan Template and Instructions on January 7th.
2. Agency IT Plans are due to ITSD on March 15th.
3. Agency IT Initiative Supplements are due to ITSD on May 3rd.